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# Vegetable

# OUTLOOK & SITUATION

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## Summary

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Because of reduced supplies, both fresh and processed vegetable prices this spring will average above a year ago. Through midsummer, however, larger supplies may keep potato prices lower than last year.

Stocks of both canned and frozen vegetables are below last year. Holdings of canned tomatoes and major frozen items (except corn) are the tightest. As of March, canners of major items other than tomatoes indicated they will contract for about a tenth less area than last year, because demand has been slow. Based on those acreage intentions, the pack of canned vegetables will likely be substantially reduced. A smaller pack, combined with the lower expected carryin, could cause significant runups in prices later this year, especially if demand strengthens. However, demand for most canned items has been sluggish since mid-1981, and this could moderate price increases. Contract area for tomatoes is expected to rise between 15 and 20 percent this year, although rainy weather in California early this spring may reduce acreage from the March intentions.

Meanwhile, vegetable freezers indicated contract acreage increases of 10 to 18 percent for major items this

year, to help offset the reduced carryover. With good weather, total 1982/83 frozen vegetable supplies could exceed those of 1981/82 and so moderate the sharp price increases of the past year.

Prices of processed vegetables have risen to reflect the reduced supplies. The Bureau of Labor Statistics (BLS) wholesale price index for canned vegetables and juices in March was over a tenth above last year, while the frozen vegetable price index was up about a fourth. The BLS retail price index for processed vegetables in March was 9 percent higher than a year ago, but only 3 percent above July 1981.

Acreage for harvest of seven major spring vegetables for fresh market is nearly the same as last year. Lettuce acreage is up slightly from last spring, while tomato area will be down about 15 percent. Although fresh market vegetable prices this spring may average moderately higher than a year ago, they will decline from this winter's weather-related high prices. It appears that the rainy weather that disrupted planting and harvesting schedules in California will lead to erratic vegetable prices this spring.

Despite a year-to-year acreage decline, Florida freezes, and a whitefly infestation in California lettuce this winter, shipments of fresh market vegetables during first-quarter 1982 were about equal to a year ago. The index of grower prices in the first quarter averaged just below a year ago. Meanwhile, the BLS retail price index for fresh vegetables rose a tenth during January-March.

Stocks of fall-crop potatoes totaled 77.5 million cwt on April 1, up 7 percent from last year but a sixth lower than 2 years ago. Disappearance of the fall crop this season has been strong—11 percent above 1981 and 6 percent above 1980. Processors have used 16 percent more potatoes this season. As a result, holdings of frozen potato products on April 1 were 3 percent more than a year ago—the first year-to-year increase since late 1980.

Because of the larger potato supplies, both grower and retail prices have been below year-earlier levels since last fall. During the first quarter, growers received an average of \$4.76 a cwt, compared with \$7.67 last year. Meanwhile, retail prices were about 15 percent less. Potato prices will increase seasonally this year as fall crop supplies diminish. However, prices through summer should average well below last year's record highs. Prices will then be determined by summer and fall crop prospects.

Because of an increased pack and slower shipments, stocks of canned sweetpotatoes are about a third more

than last year's extreme low. The strong demand from canners has kept farm prices up, although below last year's record highs. Farmers indicated they will plant 2 percent more area this spring. Based on average yields and crop abandonment, production would approximate the 1981 harvest of 12.6 million cwt.

The March BLS wholesale price index for canned mushrooms was 1-1/2 percent below a year earlier but 6 percent below July 1981. Meanwhile, producers in the Middle Atlantic States were receiving about 5 cents a pound less than a year ago. Import competition for canned mushrooms continues to seriously affect the domestic industry.

Record-large supplies have lowered prices of edible dry beans. Cumulative exports during the current season (September-February) are 13 percent above the previous one. Shipments of beans contracted by Mexico from our 1981 crop have been substantially completed. Mexico currently has large stocks and has indicated no interest in negotiating forward contracts. Growers received an average of \$19.63 a cwt during January-March, 30 percent less than last year. In February, producers indicated plans to reduce planted area by 5 percent. Production from such acreage would still likely be the second or third highest on record. Therefore, unless some unexpected export demand surfaces in coming months, prices will continue much lower than in 1981.

# Vegetable Situation

## FRESH VEGETABLES

### Current Situation

#### Shipments About Equal to Last Year During First Quarter

The vegetable situation during the first quarter was mixed. The winter area for harvest for seven leading fresh market vegetables (broccoli, carrots, cauliflower, celery, sweet corn, lettuce, and tomatoes) was down 9 percent from 1981. Adverse weather also affected the situation, but shipments of the seven vegetables increased slightly compared with last year.

The weather played a dominant role throughout the first 3 months of 1982. Although this year's freezes did not hit Florida as hard as last year's, sizable damage was reported. Damage varied from region to region, with some areas reporting as much as 100 percent loss. Of all the producing areas, only the Homestead area in south Florida went unscathed. The winter losses caused farmers to replant their crops.

Despite the bad weather, first-quarter Florida vegetable shipments declined only moderately from a year earlier. Snap beans, sweet corn, cucumbers, carrots, and tomato shipments showed marked improvement over last year's freeze-reduced total. Other vegetables (including celery, lettuce, cauliflower, onions, and cabbage) experienced declines.

Combined California shipments of broccoli, cauliflower, carrots, celery, and lettuce rose 5 percent during

January-March 1982 over the same period a year earlier. Among the crops with the largest gains were celery (up 9 percent) and carrots (up 30 percent). Shipments gained momentum as the spring season progressed, and volume rivaled—and in some cases even surpassed—that of a year earlier. From all States, first-quarter shipments of the seven surveyed vegetables plus onions were up 1 percent from 1981.

Mexican shipments of vegetables into the United States increased moderately between November and mid-April, relative to the previous year. Imports of tomatoes, squash, and bell peppers gained, while those of snap beans, cucumbers, and green onions declined. Tomatoes and cucumbers, the two major import items, accounted for 47 and 73 percent, respectively, of the total U.S. supplies of those items.

Ideal growing and harvesting conditions prevailed in west Mexico over the winter. That, along with lower U.S. domestic supplies during January and February, prompted the larger vegetable imports from Mexico. However, the trend was broken in mid-March as Mexican shipments wound down and shipments from U.S. producing regions gained.

#### Grower Prices Near, Retail Prices Above Last Year

The picture for grower and retail prices for the first quarter was one of sharp contrasts. Lettuce prices were particularly volatile during January and early February because of substantially reduced area and the California whitefly infestation. The average price per cwt in January was \$26.80 (f.o.b. shipping point), compared with \$8.07 in 1981. However, by mid-March, grower prices were \$11.00, only 40 cents higher than a year earlier. Green pepper and tomato prices have been consistently lower than last year, while other crops, such as cabbage, celery, and carrots, are up over 1981.

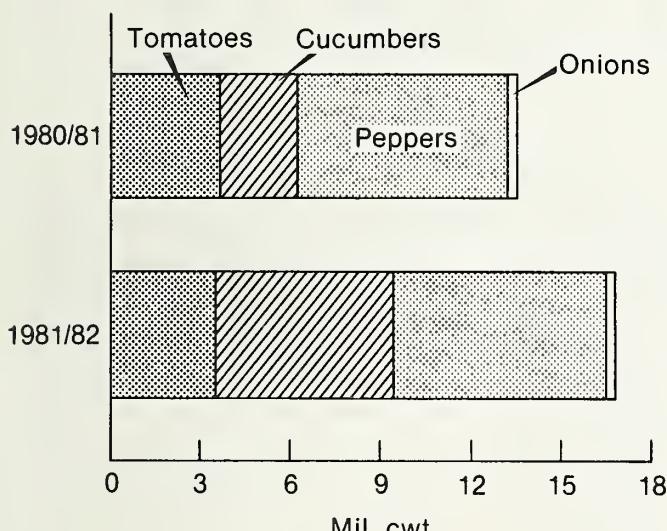
The unadjusted index of prices received by growers of fresh market commercial vegetables during first-quarter 1982 averaged 159 (1977=100), compared with 160 in 1981. However, the 1982 average is still very high compared with winter prices in the past 5 years. Retail prices for fresh vegetables (excluding potatoes) followed the same pattern. The ERS index of retail prices (derived from the Bureau of Labor Statistics' Consumer Price Index) for first-quarter 1981 stood at 287 (1967=100). In 1982, it was 340.7.

### Outlook

#### Spring Prices Likely To Increase from Last Year

The outlook for fresh vegetables for the next few months is for supplies to increase seasonally, despite acreage reduction of many crops. However, the weather will play an important part in determining yield, production, and timing of crops. The Florida cucumber and cabbage crops were damaged by heavy rains in April, but shipments for these two commodities as of mid-April

### Imports of Mexican Vegetables\*



\*Partial season - November through mid April only. Border crossings as reported by AMS.

**Table 1--Vegetables and melons for fresh market: Reported commercial acreage and projected production of principal crops, selected seasons, 1981 and indicated 1982**

Seasonal group and crop	Prospective Area For Harvest			Projected Production <sup>1</sup>		
	1981 major States	1982		Major States		Projected Production <sup>1</sup> of 1981 <sup>4</sup>
		Indicated major states	Percent of 1981	1981	Percent 1982	
	1,000 acres		Percent	Million cwt.		
Winter Spring	148.4	135.3	91			
Broccoli <sup>2</sup>	20.4	24.0	118	3.5	3.7	106
Carrots <sup>2</sup>	8.1	7.3	90	7.3	6.7	92
Cauliflower <sup>2</sup>	7.1	8.1	114	1.5	1.4	93
Celery <sup>2</sup>	10.0	9.8	98	9.6	9.1	94
Sweet corn	36.5	36.6	100	4.4	4.5	101
Lettuce	42.6	43.1	101	27.9	25.6	92
Tomatoes	33.6	28.7	85	10.4	9.2	88
Total 7 vegetables	158.3	157.6	100	64.8	60.2	93
Honeydew melons	4.0	4.9	122	.7	.7	110

<sup>1</sup>These are projections for January through June production and are based on 1979-81 average yield per acre. <sup>2</sup>Includes fresh market and processing. <sup>3</sup>May not add to total due to rounding. <sup>4</sup>Percentage figures listed are correct-Production data in this table have been rounded.

Source: Vegetables, SRS, USDA.

**Table 2--Commercial Vegetables for fresh market: Index of prices (unadjusted) received by farmers, United States, by months, 1972 to date<sup>1</sup>**

Period	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual
(1977=100)													
1972	79	67	58	68	62	62	59	63	65	57	75	70	65
1973	79	78	86	101	96	96	91	67	63	62	64	65	79
1974	69	82	67	77	86	87	77	71	71	83	85	74	77
1975	86	86	84	90	85	105	90	79	81	81	89	100	88
1976	99	90	91	95	67	79	86	81	90	96	94	87	88
1977	120	129	134	111	92	76	86	81	84	91	106	90	100
1978	103	105	112	148	120	118	106	86	89	86	89	107	106
1979	132	145	126	108	104	103	95	98	92	97	106	100	109
1980	98	93	109	118	119	111	100	104	110	105	122	129	110
1981	141	165	175	135	132	116	133	119	114	115	120	150	133
1982 <sup>2</sup>	191	161	126										

<sup>1</sup>All prices reported on f.o.b. basis. <sup>2</sup>Preliminary.

Source: Agriculture Prices, SRS, USDA.

were unchanged. It is likely that shipments will be reduced somewhat later. California was hit by cold winds and heavy rains in late March and early April. Flooded fields delayed the asparagus harvest and celery planting in the Salinas-Watsonville area. Excessive rains also retarded the planting and growth of the spring tomato crop. The Texas onion crop was hit by seed-stem problems. Elsewhere, Arctic blasts damaged 5 percent of the tomato acreage in South Carolina. In Northern areas, warmer weather permitted rapid planting progress, and fields damaged by wind and cold were replanted.

Another possible source of trouble during the coming months, especially the summer ones, will be recurrences of fruit fly infestations. California has the Medfly to contend with, while Florida has had some incidence of the Caribfly. California experts are "cautiously optimistic" because no Medfly has been seen for over 4 months.

The prospective spring acreage for seven major vegetables, down fractionally from 1981, was estimated at 158,000 acres. Commodities with increases in planted acreage include: broccoli (up 18 percent), cauliflower (up 14), sweet corn (barely changed), and lettuce (up 1). Carrots were down 10 percent and celery down 2, while tomatoes were off by 15. Spring onion plantings rose substantially, and production in Texas is placed at 3.4 million cwt, 29 percent more than in 1981. Seed-stem problems there may reduce that total, though. The honeydew melon harvest for the spring quarter is estimated at 4,900 acres, and the projected production based on the 3-year average yield is 10 percent above a year earlier.

On balance, both grower and retail prices of fresh vegetables this spring are down seasonally from winter's peaks but will likely average moderately above a year ago. Despite spring acreage close to last year's, weather

Table 3.--Consumer price index for fresh vegetables (excluding potatoes) (unadjusted),  
by months, 1972 to date 1/

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1967=100													
1972	135.6	143.6	132.1	130.1	137.4	136.6	131.2	127.1	124.2	125.4	135.1	139.8	133.2
1973	146.4	150.0	157.6	163.4	168.4	168.1	163.3	160.6	129.4	133.3	139.0	138.4	151.5
1974	145.8	147.5	156.4	142.3	167.4	169.5	170.4	144.8	139.2	141.8	157.6	152.3	152.9
1975	161.5	171.0	172.8	167.0	163.9	175.4	185.4	159.3	150.5	150.1	159.5	171.2	165.6
1976	175.3	167.3	168.2	177.5	167.6	158.5	165.6	168.1	160.3	180.5	176.8	179.4	170.4
1977	190.2	241.0	234.8	249.7	208.5	184.9	178.4	177.4	172.1	175.0	185.4	192.7	199.2
1978	205.8	216.0	215.2	237.8	256.5	245.7	232.4	203.1	192.5	201.2	203.3	208.3	218.2
1979	252.8	262.8	245.3	233.4	217.0	222.8	222.2	211.0	201.2	219.7	225.7	231.8	227.0
1980	227.0	214.1	219.7	244.3	257.4	248.0	233.2	222.4	237.2	246.1	248.6	264.8	238.6
1981	268.6	283.5	308.9	303.3	265.3	255.7	216.4	259.8	251.7	247.6	253.3	242.2	263.0
1982	352.2	361.5	308.5										

1/ Derived by Economic Research Service from the Consumer Price Index.

Source: Bureau of Labor Statistics.

**Table 4-Fresh vegetables: Average f.o.b. shipping point prices, per hundredweight,  
United States, indicated periods, 1981 and 1982**

Commodity	1981			1982	
	February	March	January	February	March 1-15
<i>Dollars</i>					
Asparagus	106.00	71.40	159.00	130.00	88.40
Beans, snap	55.00	45.00	46.60	44.00	33.80
Cabbage	7.51	7.18	11.60	13.20	12.20
Carrots	13.10	11.60	13.00	14.10	14.10
Celery	7.81	7.49	13.10	14.80	11.80
Corn, sweet	22.40	18.50	17.50	27.30	18.10
Cucumbers	-	16.10	23.80	-	20.30
Lettuce	7.84	10.60	26.80	13.20	11.00
Onions	17.20	23.50	18.40	18.10	14.30
Peppers, green	79.20	93.40	26.10	41.60	58.40
Tomatoes	46.90	48.50	27.90	31.20	22.50

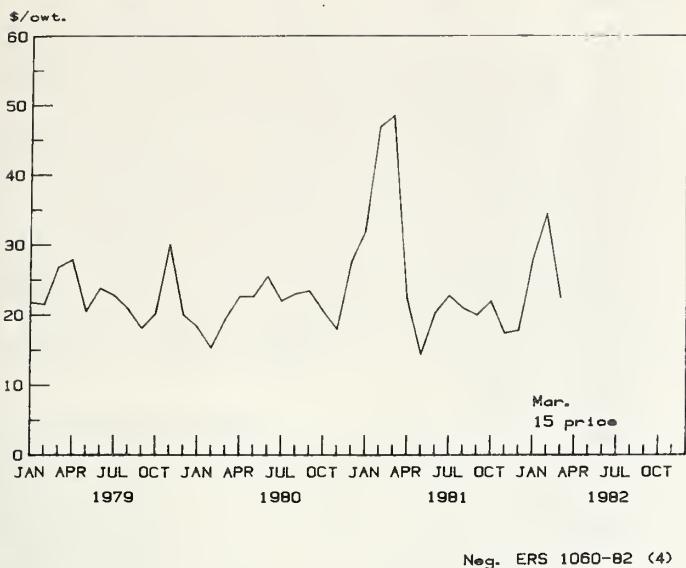
Source: Agricultural Prices, SRS, USDA.

**Table 5--Fresh Vegetables: Retail price, marketing margin, and grower and packer return per unit,  
sold in Baltimore, indicated months, 1981 and 1982**

Commodity, month, and retail unit	Retail price <sup>1</sup>	Marketing margin			Grower and Packer Return (FOB Shipping Point price) <sup>2,3</sup>
		Absolute		Percentage of retail value	
		Cents	Cents	Percent	
Carrots (Pound)					
January 1982	40.0	25.9	65	14.1	35
December 1981	50.0	31.8	64	18.2	28
January 1981	48.0	32.8	68	15.2	32
Celery (Pound)					
January 1982	37.2	26.0	62	14.3	38
December 1981	37.2	26.1	75	9.2	25
January 1981	39.5	24.0	46	21.5	54
Cucumbers (Pound)					
January 1982	57.3	31.6	55	25.7	45
December 1981	54.0	33.8	63	20.2	37
January 1981	68.7	51.3	75	17.4	25
Lettuce (Head)					
January 1982	94.0	32.4	34	61.6	66
December 1981	89.0	45.1	51	43.9	49
January 1981	64.0	50.3	79	13.7	21
Onions, dry yellow (Pound)					
January 1982	39.0	27.8	71	11.2	29
December 1981	39.0	27.9	72	11.1	28
January 1981	34.0	19.9	59	14.1	41
Potatoes, round white (Pound)					
January 1982	22.8	16.0	70	6.8	30
December 1981	23.8	15.4	65	8.4	35
January 1981	26.8	20.7	75	6.6	25
Potatoes, Russet (Pound)					
January 1982	47.0	32.6	69	14.4	31
December 1981	48.0	33.8	69	14.8	31
January 1981	41.8	22.3	54	18.7	46
Sweetpotatoes (Pound)					
January 1982	52.0	30.4	58	21.6	42
December 1981	49.0	24.6	50	24.4	50
January 1981	43.7	19.9	46	23.8	54

<sup>1</sup>Retail prices from Maryland Department of Agriculture. <sup>2</sup>For quantity of product equivalent to retail unit sold to consumers; because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. <sup>3</sup>Production areas: Carrots-California; Celery-California; Lettuce-California; Onions-New York; Potatoes, round white-New York; Potatoes, Russet-Idaho; and Sweetpotatoes-North Carolina.

### Tomatoes: U.S. Grower Prices



developments early in spring will affect the year-to-year rise in prices.

### Prospects for Leading Items

#### **Tomatoes**

This year's first-half tomato crop, at 9.21 million cwt (based on 1979-81 yields), is projected to be 12 percent less than a year earlier because of lower harvested area. The 1982 spring-quarter area for harvest in the major producing States is estimated at 28,700 acres, off about 15 percent from last year.

Weekly shipments from Mexico during the winter were up sharply over a year earlier until mid-March. Then the trend was reversed as the Mexican shipments wound down. Florida shipments did not drop as sharply as with last winter's freeze. Instead, they were up 24 percent during first-quarter 1982 over the comparable period a year earlier.

The greater availability of tomatoes this season was reflected in monthly average f.o.b. prices, which are down sharply from 1981. During March, growers received an average of \$22.50 a cwt, compared with \$48.50 in 1981. Retail prices of tomatoes during March averaged 98 cents a pound, 19 cents less than last year. Late April prices for 25-pound cartons were quoted at \$6.00 in Florida, compared with \$5 during the last week of April 1981.

April shipments out of Florida continued well above this winter. However, area planted for harvest during May and June was sharply reduced from last year. The heavy rains flooded some Florida fields in early April, but the overall damage was minimal. Lack of moisture is posing a problem in some areas of Texas, although some fields in east Texas were replanted due to cool, wet weather. Too much moisture is also dimming prospects in California. The desert crop, however, is doing well. Harvest began in mid-April and should peak in early June and continue until mid-July. South Carolina finished planting its summer crop, 5 percent of which was damaged by wind and frost in April.

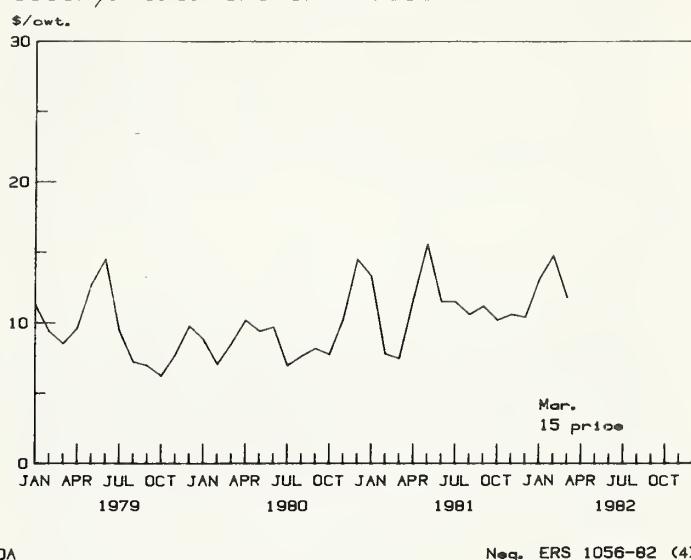
With the spring harvest underway, supplies should continue above this winter's level. New fields are matur-

**Table 6-Major sources of U.S. winter tomato supplies<sup>1</sup>**

Season Nov. 1 thru mid-April	Florida	Mexico <sup>2</sup>	Other*	Total	Mexico as percent of total
					Thous. cwt.
1980/81	5,512	4,095	1,610	11,217	36
1981/82	5,549	3,727	1,123	10,399	36

<sup>1</sup>Source: Fruit and Vegetable Division-AMS-USDA. <sup>2</sup>Border crossings include shipments to Canada.

### Celery: U.S. Grower Prices



ing in Florida, and the overall crop ranged from fair to good in late April. On balance, it is likely that prices this spring will average above last year's in response to reduced acreage and output. Adverse weather in Florida in April could cause further rises. Size, quality, and yield will depend largely on continuing weather developments in producing regions.

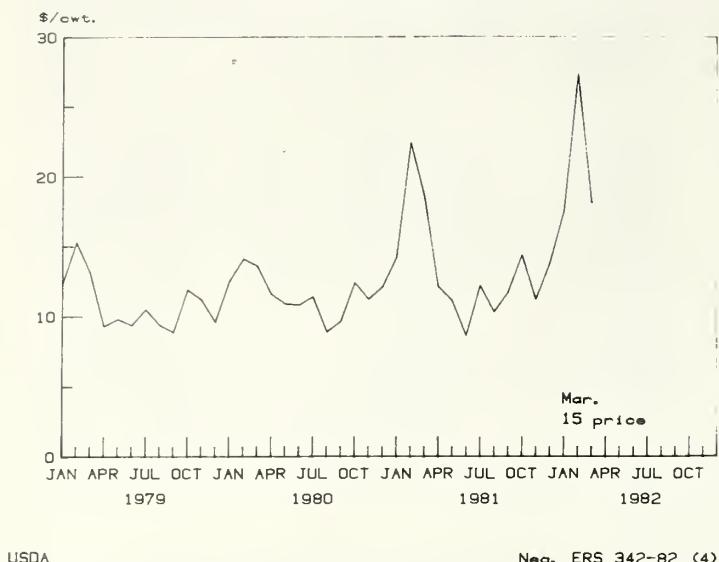
#### **Celery**

This year's celery crop likely will be down from 1981. The prospective area for harvest during the 1982 spring quarter is estimated at 9,800 acres, 2 percent less than the comparable period a year earlier. Production for the first half is projected at 9.08 million cwt (based on 1979-81 yields), 6 percent less than 1981. Spring harvesting schedules in Florida were a few days late because of heavy rains, while California's early crop in the Coachella Valley should be ready for harvest in early May. Harvest on California's South Coast was hindered by rain.

The Florida freeze seriously affected the celery crop, as shipments fell to almost half their normal volume. During the first quarter, Florida shipments were 38 percent less than a year earlier. All other areas, though, showed increases, but total celery shipments were down moderately from 1981.

Celery prices are up over last year, but they have begun to decline from the early 1982 level in response to greater availability. Grower prices for the first quarter of 1982 averaged \$13.23 a cwt, 39 percent above 1981. Retail prices for celery this quarter averaged 50 cents a

## Corn: U. S. Grower Prices



pound, compared with 43 cents a year earlier. The quality of Florida's spring crop is excellent, and volume is expected to be heavy through May and then decline in June. Harvesting in California is going well, although planting was delayed in the Salinas-Watsonville area because of wet fields. In general, it seems that celery prices will probably remain higher than in 1981, as supplies likely will be reduced.

### Sweet Corn

More sweet corn is being grown this spring. The 1982 area for harvest during spring is 36,600 acres. Output is projected at 4.5 million cwt from January to June, up 1 percent over the same period in 1981.

The harvest gained momentum in Florida during April, with heavy supplies coming from the Pompano-Dade County areas. Warm weather after the freeze brought on the spring crop 10 to 15 days earlier than normal. Growers in the Everglades began pulling corn in early April, while the Zellwood area expects to begin harvesting around mid-May. California's early crop should be ready for harvest for western markets in early May.

First-quarter shipments of sweet corn were largely from Florida, the major producing area. From January through mid-February, movement was off because of the effects of the freeze. However, the pace quickened thereafter. Shipments for the first 3 months of 1982 were 8 percent more than a year earlier. Prices reflect the same trend as shipments. During the early weeks of January, prices were high because of reduced supplies. Later, when the crop began to recover and volume increased, prices dropped. In March, the average f.o.b. shipping point price per cwt was \$18.10, down slightly from a year earlier.

The outlook for grower prices through the early half of 1982 is fair. The larger spring crop implies that prices should continue to edge downwards somewhat, although they will likely stabilize around last year's levels. The early maturation in Florida promises a longer marketing period, and avoidance of market gluts and subsequent depressed prices. California's crop should be ready for West Coast outlets in early May.

## Onions

In 1982, the total spring onion area planted for harvest is estimated at 28,400 acres, 13 percent over 1981. The Texas spring onion crop is forecast at near-record levels. USDA estimates that 3.49 million cwt will be produced, 29 percent above 1981. Acreage for Texas is up 8 percent over 1981, while yields are forecast to rise a fifth. The Texas crop was plagued by seed-stem problems, and a sizable part was lost. North Texas and the High Plains are dry, but the crop was progressing well. Onions also are showing good growth in the San Antonio-Winter Garden area. Despite larger planted area, California's Imperial Valley and Arizona's Phoenix region expect to ship fewer onions. In addition, hail damaged onions in the San Joaquin Valley.

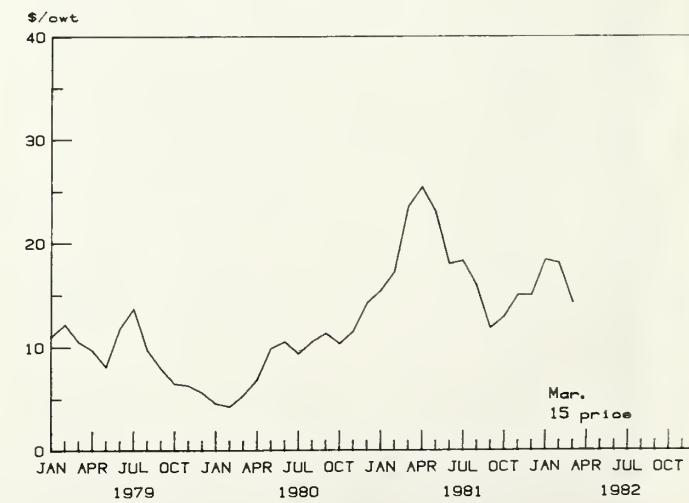
Summer storage onion crop acreage is estimated at 56,660 acres, an increase of 5 percent from 1981. Nearly all States are forecast to have larger acreage. Meanwhile, summer nonstorage crop acreage also is expected to increase in 1982. It is projected that 13,300 acres will be planted in 1982, 14 percent more than 1981.

For first-quarter 1982, movement of Texas onions was up 40 percent over 1981. Movement in other areas, except central California, was below last year. Overall, movement for the first quarter was down from a year earlier.

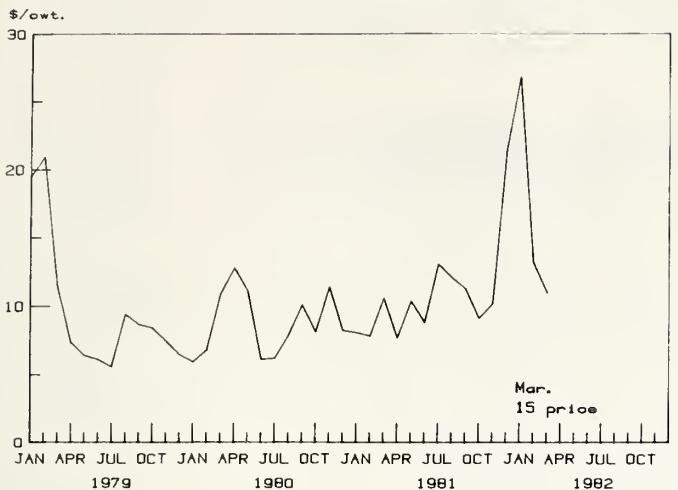
Over the past years, prices have fluctuated greatly, as the demand for onions is highly inelastic. Small changes in supplies typically resulted in substantial price changes. An example of this seesaw effect was seen last year, when the early onion crop was cut down by blight and bad weather, and quarterly grower prices averaged \$18.70 a cwt, compared with \$4.67 in 1980. Grower prices remained strong during the first 2 months of this year. However, as it became apparent that acreage and yield were up, the average price dropped 21 percent from February to March, to \$14.30, two-fifths lower than a year earlier. Onions retailed at 39 cents a pound January-March, compared with 38 cents in 1981. Retail prices were above last year's but still followed seasonal trends.

Prices this spring likely will be down from last year's unusually high levels but are expected to improve. The moderate rise in summer onion acreage suggests onion

### Onions: U. S. Grower Prices



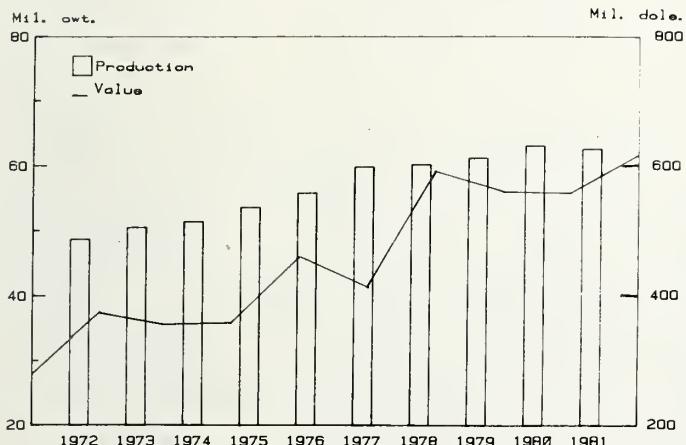
### Lettuce: U.S. Grower Prices



USDA

Neg. ERS 1059-82 (4)

### Lettuce: U.S. Production and Value 1/



1/ Excludes Hawaii

USDA

Neg. ERS 288-82 (4)

prices will average lower during second-half 1982 than in 1981.

### Lettuce

Lettuce acreage for harvest is estimated to be up 1 percent this spring over 1981, to 43,100 acres. Arizona's prospective area for harvest is 5,500 acres, up 2 percent from 1981, while Florida's is holding steady at 4,500 acres. In all regions of California, spring-quarter area is down, by as much as 9 percent on the South Coast to as little as 1 percent on the Central Coast. Based on the 1979-81 average yield, production during the first 6 months of 1982 will be around 25.6 million cwt, a substantial decline from a year earlier.

The lettuce crop continues to be hard hit this year. First, Florida output was cut by the freeze. During early April, both Florida and California experienced heavy rains which could further damage the crop. The net effect of the inclement weather is difficult to determine, since lettuce markets have been running substantially higher than a year earlier. Shipments out of San Joaquin Valley—which has nearly half of spring lettuce acreage—were up over 1981 through mid-April and peaked in late April. Along the South Coast, shipments could be postponed until the end of May because plantings were reportedly delayed. Other parts of the Salinas Valley were inundated by rain and damaged by hail, with some young plants turning yellow. Impassable field conditions there made it difficult to assess the damage. Good quality and head weight were reported in Florida, where supplies were expected through May. The Arizona harvest should continue to June.

During first-quarter 1982, lettuce shipments dropped 2 percent, largely due to declines in Florida. All other areas exhibited increases, despite reduced acreage and the whitefly problem in the Imperial Valley. Prices for lettuce have been variable. Early 1982 saw them zoom because of whitefly damage, smaller acreage, and the freeze. They dropped when conditions returned to normal and shipments increased above year-earlier levels. In 1982, first-quarter prices to growers averaged \$17.00 per cwt, compared with \$8.84 in 1981. Meanwhile, retail prices also soared above last year's levels. The first-quarter 1982 average was 73 cents a pound, up 70 percent over 1981. Wholesale prices climbed in early April as cold weather and rains hit the major producing regions, but fell to near year-ago levels in late April.

Lettuce prices likely will decline as the spring crop progresses, but they should stay above last year's level, despite the increased spring acreage. Supplies should be adequate and quality fair to good, depending on future weather developments.

### Carrots

The 1982 winter-spring carrot crop is placed at 6.75 million cwt (based on 1979-81 yields), 8 percent less than a year earlier. Prospective area for harvest during spring 1982 is estimated at 7,300 acres, down substantially from 1981.

The carrot harvest is completed in the Rio Grande Valley in Texas and is nearly finished in the San Antonio Winter Garden area. Planting for the spring harvest in Texas was completed with little delay. Growing conditions in Texas were good, but irrigation was necessary. In California, prior to the rains, the carrot crop was developing normally, and the rains affected the Florida crop minimally.

Carrot shipments during first-quarter 1982 rose 10 percent above a year earlier, despite the lower harvested area. Central California showed the largest gains, while Florida experienced the largest declines, primarily due to the freeze.

The outlook for carrots follows the general pattern for vegetables this year—diminished supply and higher prices. Average grower prices ran higher for the first three 3 months of 1982—\$13.73 a cwt compared with \$12.57 in 1981. Prices are likely to continue at that level. Retail prices for carrots were 5 percent higher the first 3 months of 1982 than in 1981. The average retail price per pound was 40 cents, as opposed to 38 cents a year ago.

**Table 7-Fresh vegetables: Representative prices (wholesale lots) at New York and Chicago for stock of generally good quality and condition (U.S. No. 1 when available) indicated periods, 1981 and 1982**

Market and commodity	State of origin	Unit	Tuesday nearest mid-month					
			Mar. 17	Apr. 14	Jan. 12	Feb. 16	1982 Mar. 16	Apr. 13
Dollars								
New York								
Beans, snap, green	Florida	Bu. hamper and crt.	26.50	21.00	20.00	18.00	14.50	14.50
Beets, bunched	Texas	1-2/5 bu. crt. 2 doz.	-	-	-	-	-	-
Broccoli, bunched	California	14's bu., ctn.	10.50	21.00	20.00	12.50	9.00	14.50
Cabbage, Domestic Round type	Florida	1-3/4 bu. crt.	6.00	5.75	6.50	10.00	8.25	8.00
Carrots:								
Topped, washed	California	48-1 lb. film bag, ctn.	9.00	8.50	11.50	11.50	12.00	10.50
Topped, washed	Texas	48-1 lb. film bag, mesh	-	-	-	-	-	-
Cauliflower	California	Ctn. film wrpd., 12's	11.50	14.40	16.50	16.50	15.50	21.00
Celery:								
Pascal	California	Crt. 2-3 doz.	9.50	8.50	14.50	17.50	13.50	-12.50
Pascal	Florida	Crt. 2-3 doz.	7.00	8.25	12.50	15.25	9.00	10.50
Corn, sweet (yellow)	Florida	4-1/2-5 doz. crt.	12.50	10.00	10.50	-	-	6.50
Cucumbers	Florida	bu. bskt.	21.00	19.50	-	-	-	-10.50
Lettuce, Iceberg	California	2 doz. ctn.	7.50	7.50	19.00	11.50	11.50	14.00
Onions:								
Yellow, Globe, medium	New York	50-lb. sack	10.50	10.75	6.75	7.50	6.00	8.00
Yellow, Granex, large	Texas	50-lb. sack	-	11.00	-	-	-	9.50
Peppers, green	Florida	Bu. crt., large	36.00	19.50	10.50	20.50	16.50	12.50
Spinach, Savoy	Texas	Bu. bskt.	-	-	-	-	-	-
Tomatoes, large <sup>1</sup>	Florida	30-lb. ctn.	36.25	20.00	12.00	14.75	9.50	8.50
Chicago:								
Beans, snap, green	Florida	Bu. hamper and crt.	27.50	19.50	18.00	21.50	17.50	15.00
Beets, bunched	Texas	Crt., 24's	-	-	-	-	-	-
Broccoli	California	14's bu., crt.	10.75	9.75	17.50	12.50	9.00	12.00
Cabbage, Domestic Round type	Texas	1-3/4 bu. crt.	6.00	6.00	7.00	10.25	9.00	8.75
Carrots:								
Topped, washed	Texas	48-1 lb. film bag, mesh master	-	7.75	-	-	10.50	-
Cauliflower	California	Ctn. film wrpd. 12's	12.75	-	18.00	17.00	15.50	18.50
Celery:								
Pascal	California	Crt. 2-3 doz.	9.00	9.50	14.50	15.00	13.00	12.00
Pascal	Florida	Crt. 2-4 doz.	7.75	9.25	-	-	-	11.50
Corn, sweet (yellow)	Florida	4-1/2-5 doz. crt.	-	10.50	11.00	-	11.00	8.00
Lettuce, Iceberg type	Arizona	2 doz, head ctn.	7.00	7.00	19.50	11.00	10.50	14.00
Onions:								
Yellow, Granex, med	Texas	50 lb. sack	-	-	-	-	9.75	-
Yellow, Globe, med	Midwestern	50 lb. sack	12.25	-	6.37	7.25	7.00	-
Peppers, green	Florida	Bu. ctn., and crt.	-	25.00	11.75	-	-	15.00
Tomatoes, large <sup>1</sup>	Florida	30 lb. ctn.	-	20.50	12.00	16.00	-	12.50

<sup>1</sup>As of January 1982 tomatoes are in 25 pound carton.

Source: Weekly summary of terminal market prices, Market News Report, AMS, USDA.

**Table 8-Canned vegetables: Commercial packs 1980 and 1981 and cannery stocks 1981 and 1982 by commodities, United States**

Commodity	Pack		Stocks		
	1980	1981	Date	Cannery <sup>1</sup> 1981	1982
1,000 cases 24/303's					
Major commodities					
Beans, snap	59,689	52,809	Mar 1	29,547	28,099
Beets	11,322	8,573	Jan 1	11,250	9,365
Corn, sweet	50,574	57,949	Mar 1	20,963	24,725
Peas, green	30,056	27,296	Mar 1	14,267	13,111
Sauerkraut	11,280	13,289	Mar 1	5,239	6,530
Total	162,921	159,916		81,266	81,830
Tomato items					
Tomatoes, whole	53,096	51,937	Jan 1	33,547	28,461
Tomato juice <sup>2</sup>	26,617	17,507	Jan 1	14,543	11,457
Total	79,713	69,444		48,090	39,918
Other commodities					
Asparagus	2,535	2,844	Mar 1	728	648
Beans, lima	2,833	2,602	Mar 1	1,547	1,499
Carrots	5,084	3,465	Jan 1	3,941	3,632
Pickles	68,227	64,443	-	-	-
Pimientos	540	-	-	-	-
Pumpkin and squash	3,744	3,975	Jan 1	707	729
Potatoes	15,043	15,039	-	-	-
Sweetpotatoes	5,917	na	Jan 1	2,250	2,974
Spinach	6,314	7,842	Mar 1	3,407	3,301
Total comparable other items	110,237	94,143		12,580	12,783
Grand total comparable items	352,781	323,503		141,936	134,531

<sup>1</sup>Crop for processing converted to a canned basis by applying an overall conversion factor (pickles 112 cases and sauerkraut 54 cases equivalent to 1 ton fresh). <sup>2</sup>Includes combination vegetable juices containing at least 70 percent tomato juice. N.A. = not available.

Cannery stock and pack data from the National Food Processors Association, unless otherwise noted.

**Table 9--Frozen Vegetables: Cold storage holdings and indicated disappearance, January 1 to April 1**

Commodity	April 1 Stocks			January 1 - April 1 Net Change		
	1980	1981	1982 <sup>1</sup>	1980	1981	1982 <sup>2</sup>
<i>Million pounds</i>						
Asparagus	8	5	3	-3	-3	-2
Beans, lima:						
Fordhook	28	29	8	-11	-11	-11
Baby	60	31	23	-17	-20	-19
Total	88	60	31	-28	-31	-30
Beans, snap:						
Regular	80	88	75	-41	-48	54
French style	43	33	27	-17	-20	-21
Total	123	121	102	-58	-68	+35
Broccoli:						
Spears	39	34	30	-11	-14	-12
Chopped and cuts	47	39	36	-7	-12	-6
Total	86	73	66	-18	-26	-18
Brussels sprouts	37	39	34	-10	-16	-17
Carrots:						
Diced	72	52	61	-34	-32	-29
Other	54	39	47	-17	-14	-13
Total	126	91	108	-51	-46	-42
Cauliflower	58	46	38	-25	-24	-19
Corn, sweet:						
Cut	122	87	82	-97	-104	-79
On-cob	164	114	125	-60	-55	-67
Total	286	201	207	-157	-159	-146
Mixed Vegetables	51	40	44	-2	-5	5
Okra	23	16	15	-12	-17	-14
Onions:						
Rings	12	11	11	(3)	-1	-4
Other	15	14	14	(3)	-2	-3
Total	27	25	25		-3	-7
Peas, blackeyed	9	5	7	-3	-4	-4
Peas, green	151	122	89	-130	-105	-92
Peas and carrots	11	10	9	(3)	-1	-1
Spinach	52	63	58	-7	9	-5
Southern greens	26	26	23	-2	-3	-7
Other vegetables	163	158	162	-33	-28	-40
Total vegetables <sup>2</sup>	1,325	1,101	1,021	-535	-530	-419
Potatoes:						
French fried	790	650	713	-102	23	138
Other frozen	117	125	126	-7	21	13
Total frozen potatoes	907	775	839	95	44	151
Grand total <sup>2</sup>	2,232	1,876	1,860	-440	-486	-268

<sup>1</sup>Preliminary. <sup>2</sup>May not add to total due to rounding. <sup>3</sup>less than 0.50.

Source: Cold Storage, SRS, USDA.

## PROCESSED VEGETABLES

### Current Situation

#### Processed Vegetable Holdings

##### Below Last Year

Stocks of both canned and frozen vegetables are below last year. Canners have fewer cases of all items except corn and sauerkraut, with holdings of tomato products especially tight. Canned vegetable supplies for 1981/82 were moderately reduced because of a much smaller car-

ryin and a reduced pack. Meanwhile, shipments of nearly all canned items since mid-1981 have declined relative to a year earlier. Only canned tomatoes and asparagus have posted gains.

Vegetable supplies in frozen storage on April 1 totaled 1.042 billion pounds, 7 percent less than last year and a tenth less than the 1977-81 average. The shortfall in stocks resulted from a greatly reduced 1981 carryover, which was not offset by the increased pack.

### Prices Rise To Reflect Lower Supplies

The BLS wholesale price index for canned vegetables and juices stood at 242.3 (1967=100) during March, over

**Table 10-Vegetable for commercial processing: Planted acreage 1980 and 1981, and prospective acreage, 1982**

Crop	Planted Acreage			1982 as percent- age change from contract 1981	
	1981		Prospective 1982		
	1980 Total	Total			
1,000 acres				Percent	
Beans, green lima:					
Freezing	29.8	30.3	30.3	34.2	
Canning	23.8	20.6	20.6	16.9	
Bean, snap:					
Freezing	59.8	59.0	56.9	62.8	
canning	215.3	171.5	164.6	141.6	
Beets for canning	14.8	10.6	10.4	11.7	
Corn, sweet:					
Freezing	116.1	129.8	127.6	151.2	
Canning	288.0	292.6	292.1	288.1	
Cucumbers for pickles (spring, summer and fall)	119.7	100.6	87.8	86.5	
Peas, green:					
Freezing	126.2	129.6	128.8	143.8	
Canning	218.9	187.5	187.5	167.8	
Tomatoes	267.4	258.3	252.6	296.1	
Total 7 crops <sup>2</sup>	1,479.8	1,390.4	1,359.2	1,400.7	
				103	

<sup>1</sup>Under contract. <sup>1</sup>May not add due to rounding

Source: Vegetables, SRS, USDA.

a tenth more than a year earlier, while the BLS wholesale index for frozen vegetables rose over a sixth above 1981. At the retail level, the Consumer Price Index for processed vegetables was 138.2 (1967=100) during March, about 9 percent higher than in 1981. Such increases are in line with the reduced supplies, but higher marketing costs have also contributed. In addition, farmers have received a slightly increased share of the marketing spread over the past year.

Both canned and frozen vegetable prices will probably increase this spring as stocks on hand decline. The price picture will become clearer as prospects for this year's crop unfold.

## Outlook

### Prospective Contract Acreage Up

As of March, growers and processors indicated a 3-percent rise in contracted acreage of seven major processing vegetables. Contract intentions for tomatoes are up substantially, but down about 7-1/2 percent for other leading canned items. Although canned stocks are below a year earlier, they are still relatively high by historical standards, with the exception of tomatoes. However, based on the current intentions, the pack of vegetables will likely be substantially reduced. In addition to acreage decreases, last summer's ideal growing conditions in the Midwest will probably not be duplicated and yields will be smaller. Thus, there could be substantial runups in the prices of canned goods during second-half 1982. However, sluggish sales of canned vegetables since mid-1981 could temper any price increases.

Conversely, vegetable freezers indicated contract acreage increases of 10 to 18 percent this year. Average yield and pack relationships suggest increased production of frozen vegetables to offset the lower carryover. Indeed,

total 1982/83 supplies may exceed 1981/82. This should moderate the sharp price increases of the past year.

On balance, processors can be expected to increase their total contract acreage this year because of tight stocks. However, high interest rates and larger processing costs encourage processors and retailers to reduce inventories and gear production to current consumption rates. The current sluggish economy tends to discourage both retail and institutional sales. But, higher fresh vegetable prices this spring could cause greater sales of processed items.

Growers of processing tomatoes are in the strongest bargaining position this year and could recoup losses of the past few years. Growers of sweet corn and peas for freezing also could get moderate price increases for their output. However, with field corn and soybean prices—as well as those of other alternative crops—likely to be relatively low, growers will be limited as to any price increases they can obtain from processors.

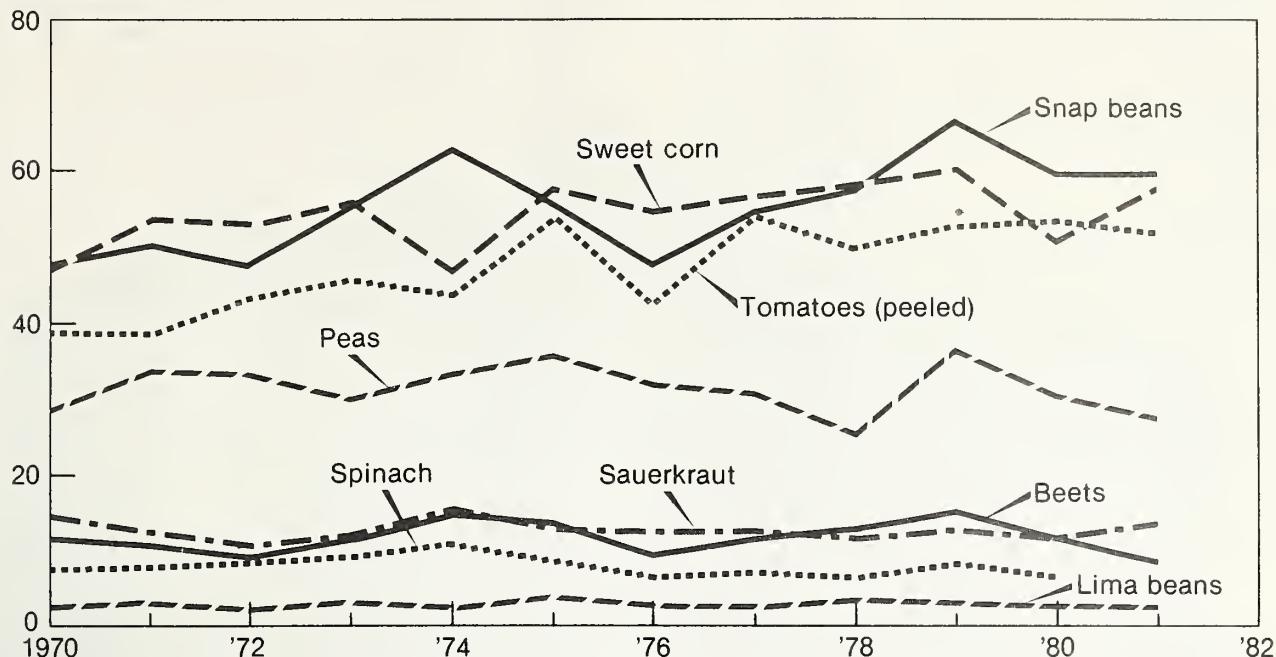
## Prospects for Leading Items

### Tomato Products

Reflecting decreased output of processing tomatoes and lower packs the past 2 years, cannery stocks of tomato products on January 1 were about a fifth lower than a year ago. The lower stocks also resulted from generally larger shipments of tomato products during second-half 1981. Shipments of canned tomatoes from July through December 1981 increased 6 percent from the previous year, while tomato juice shipments fell by over a half. Of the major items, January 1 stocks of canned tomatoes totaled 28.5 million cases (basis 24/303's), 15 percent less than last year, and cannery tomato juice stocks equaled 11.5 million cases, down over a fifth from last year.

## Selected Canned Vegetable Packs

Mil. cases



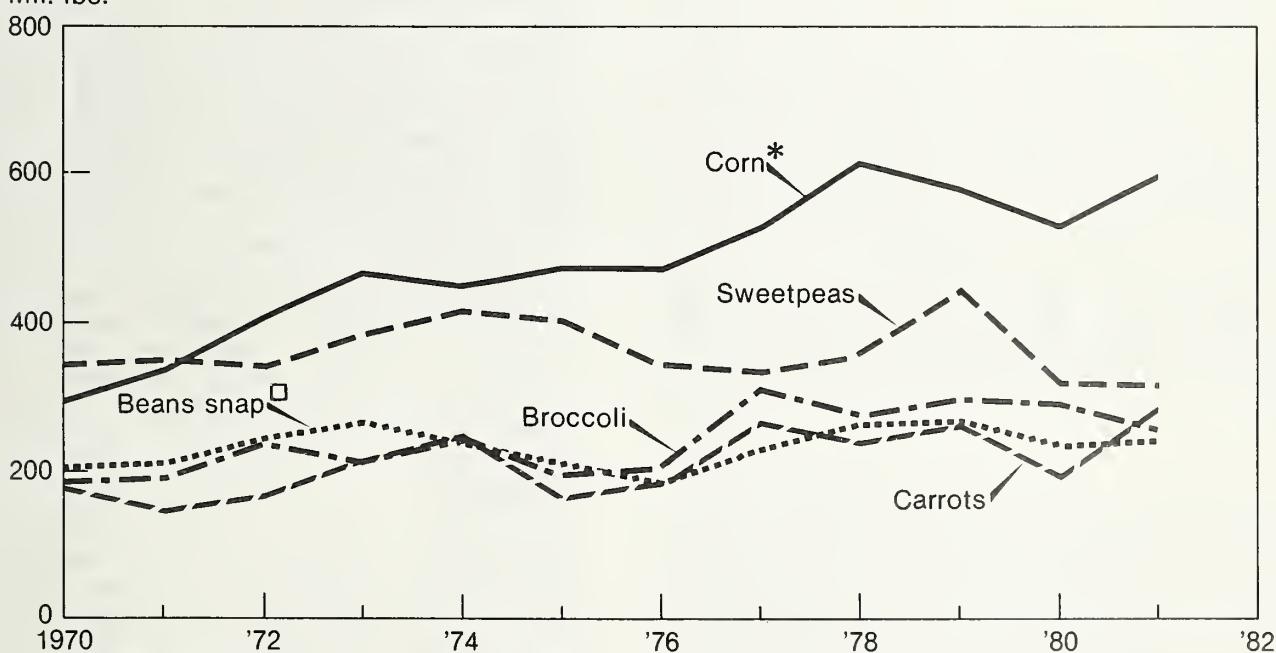
Source: National Food Processors Association.

USDA

NEG. ERS 2441-82(4)

## Selected Frozen Vegetables—Annual Pack

Mil. lbs.

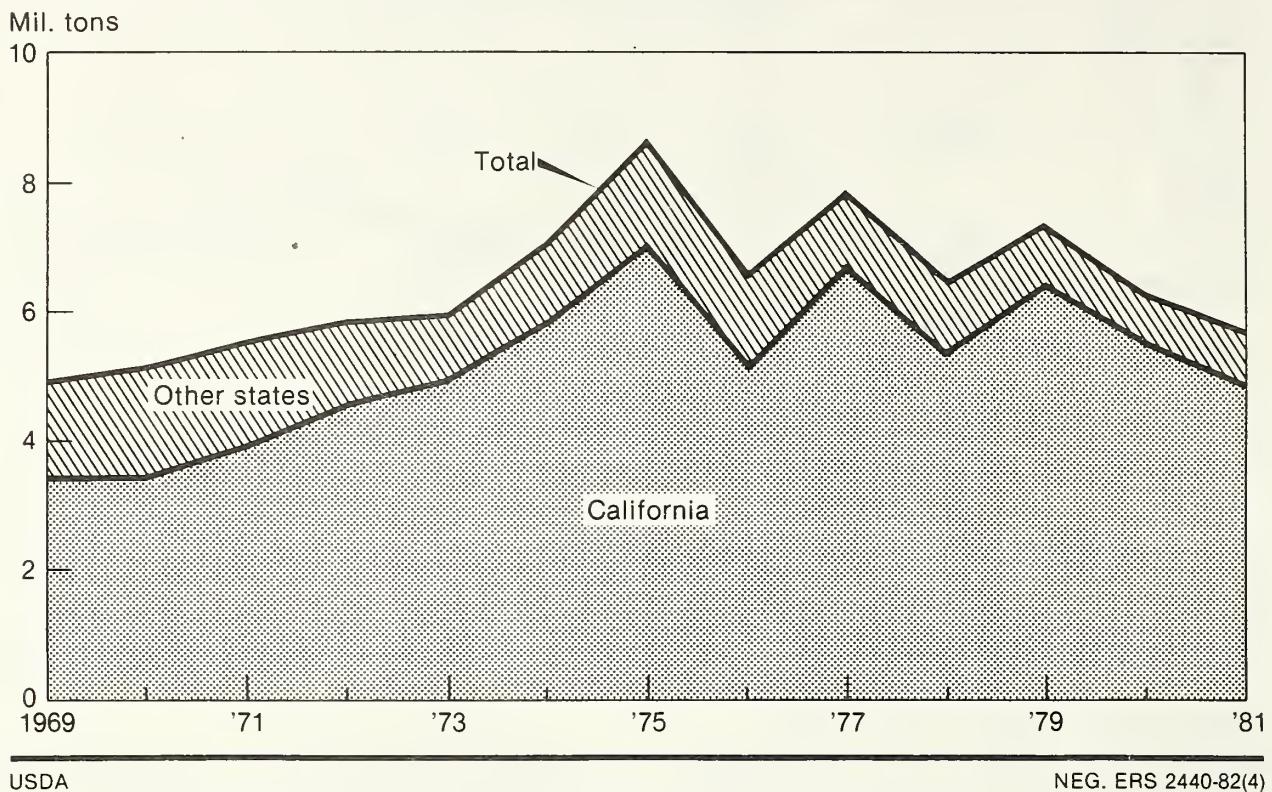


\*Cut corn and corn-on-cob. □ Includes french, italian green beans and wax beans.  
Source: American Frozen Food Institute.

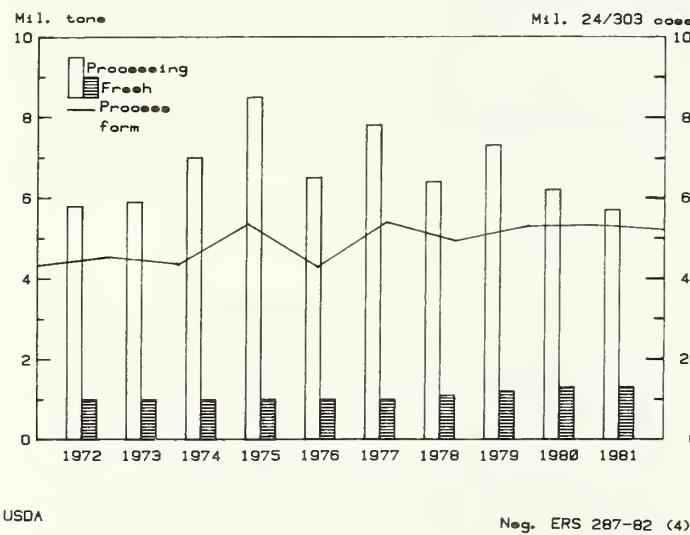
USDA

NEG. ERS 2443-82(4)

## Processed Tomato Production



## U. S. Tomato Production and Pack



Increased prices reflect the lower supplies. During 1981, the BLS wholesale price index for canned tomatoes, canned tomato juice, and tomato catsup averaged 15, 16, and 20 percent higher, respectively, than in 1980. Canners' price quotations for almost all tomato products during April were substantially above last year.

The reduced supplies of tomato products will cause a rise in production of tomatoes for processing this year. Depressed prices of alternative crops could also effect some increase in planted acreage. As of March, pro-

sors indicated they intend to contract with growers for 296,100 acres, up 17 percent from last year's contracted total. In California, which produces about four-fifths of the crop, contract area was estimated to rise 18 percent to 242,000 acres.

For the United States, contracted tonnage was indicated at 7.4 million tons, up 32 percent from 1981. However, that figure is likely too high, because it would require an average yield of 25 tons per acre. The record-high average is 1980's 23.61 tons. Also, wet fields in northern California seriously delayed plantings and may lead to problems with delivery schedules and early fall storms. Yields could be reduced because of root rot and poor stands stemming from the wet weather. However, given the indicated contract acreage, the normal quantity of processing tomatoes bought on the open market, typical crop abandonment, and average yields, total production will likely range between 6.4 and 6.9 million tons, compared with 5.7 million last year. The combined pack of all tomato products will probably rise between a tenth and a fifth this year, with all categories likely to post increases.

## Sweet Corn

Canners' stocks of sweet corn totaled 24.7 million cases (24/303's) on March 1, up 18 percent from last year's low level. A large 1981 pack—the second highest on record—and a 3-percent decrease in shipments for July 1981–February 1982 caused the stock rise. Stocks of institutional-size cans were sharply lower than a year ago, while retail-size packs were up about a third.

During 1981, the BLS wholesale price index for whole kernel corn peaked during June at 223.8 (1967=100),

and averaged 211.7 for the year, compared with 170.4 during 1980. Since June, the index has declined steadily, and in March it stood at 210.4. Canners' prices for whole kernel corn reflect the relative abundance of the various size packs. Institutional packs were typically quoted at \$13 a case (6/10's) during April, up about \$3 from last year, while prices of retail-size cases (private label, 24/303's), at around \$8, were about 25 to 50 cents lower.

Raw tonnage of corn for canning will probably not match last year's. Canners intend to contract for 288,000 acres this year—1 percent less area. In addition, growing conditions were nearly ideal last summer in the Midwest, from which the bulk of the output comes. Yields reached a record high, and crop abandonment was less than normal. Such favorable conditions may not be repeated this season, and this year's pack will be correspondingly smaller. On balance, higher carryover stocks and lower production will likely cause total supply for 1982/83 to range from even to 6 percent below 1981/82. Prices of canned corn, especially institutional cases, will likely increase slightly this spring with the prospect of lower production. However, abundant supplies currently available should moderate price increases.

Stocks of frozen corn on April 1, at 207 million pounds, were up 3 percent from last year, with reduced cut-corn stocks being offset by larger cob-corn stocks. Despite the second largest pack ever of cut corn last year, brisk sales have caused reduction in stocks to 5 percent less than last year. Prices have risen accordingly. Freezers' prices for frozen cut corn were quoted at \$7.80 a case (24/10-ounce) in early April, over a fifth higher than last year. Conversely, stocks of frozen cob-corn were up 10 percent on April 1, due to lagging shipments and last year's large pack. It now seems likely that disappearance of cob corn will decrease during the current pack year for the first time since 1973/74.

When the new pack season gets underway this summer, carryover stocks of frozen corn will likely be equal to or smaller than last year's very small carryover. Holdings of cut corn will be especially tight. Although the cob-corn carryover could be moderately above last year's, such a level is still small given the rapid and large expansion in sales of the past few years. Anticipating this small carryover, processors expect to contract for 151,170 acres this summer, an 18-percent rise from last year's contracted area. Based on average yields and abandonment, production would rise about a sixth from last year and be record-high. Assuming average relationships between raw tonnage and pack, supplies of frozen corn would rise about a tenth over 1981/82. Prices will remain well above year-earlier levels into summer. If the larger pack moderates price increases at all, it will be in second-half 1982.

## Peas

On March 1, cannery held 13.1 million cases (basis 24/303's) of peas, 8 percent less than last year. Holdings of institutional-size cases were extremely tight, while retail sizes were up slightly. The drop in stocks reflects lower 1981/82 supply resulting from a smaller pack and slightly lower carryover. Shipments by cannery from June 1981 through February 1982 also declined 8 percent from the previous year. The BLS wholesale price index for canned peas was 3 percent higher during February than last year. The index peaked last June at 207.5 (1967=100) and has since fallen to 194.4.

It now appears cannery shipments for the 1981/82 pack year will total 27 to 28 million cases, the lowest in

well over a decade. However, carryover stocks will probably be 1/2 to 1 million less than last year's. As of March, prospective contracted area for canning peas was 167,750 acres, a tenth less than 1981's contracted area. Actual contract acreage will likely be higher, as the March intentions have always been lower than final plantings. Based on average yields, abandonment, and pack relationships, the 1982/83 pack will likely be less than 25 million cases, leaving total supplies down about a tenth. This suggests canned pea prices could rise during second-half 1982.

Stocks of frozen peas on April 1 were also down substantially from a year ago—more than a fourth—because of reduced 1981/82 supplies. Reflecting the tight stocks position, the BLS wholesale price index for frozen green peas rose during March over a third above last year.

Although the carryover this summer may be a fourth to a half of last year's low level, a larger pack is in the offing for 1982/83. As of March, indicated contracted acreage for this year was over a tenth higher than last year. This should result in a substantial increase in the pack, leaving 1982/83 supplies up to 10 percent larger than 1981/82, and causing prices by this fall to be equal to or less than last year.

## Snap Beans

Cannery held 28.1 million cases (basis 24/303's) of green and wax beans on March 1, moderately below a year ago but still relatively high for that date. Stocks of both consumer and institutional cases declined. Shipments since July 1981 have been running behind the previous season's pace, so the decreased stocks are the result of the reduced 1981 pack. Despite ample supplies of canned green and wax beans, the BLS wholesale price index for green beans rose 6 percent in 1981. However, since July the index has retreated from 206.7 (1967=100) to 198.3 in March, or 2 percent above last year.

Carryover stocks for the 1982/83 pack year will likely be within 2 million cases of last year's record high. However, indications are that supplies could be much tighter next year. Processors expect to contract for 14 percent less acreage this year. In addition, last year's extremely high yield of 3 tons per acre probably will not be repeated. Based on historical relationships, 1982/83 canned snap bean supplies could be down 5 to 20 percent. Prices probably will edge upward in the coming months. A short crop could cause substantial price runups later this year.

Holdings of frozen green beans totaled 103 million pounds on April 1, down 16 percent from last year but above 1977-80 levels. Movement of stocks through 1981/82 has risen moderately over 1980/81. Institutional pack prices in April were steady at 47 cents a pound, a nickel more than last year. Meanwhile, prices of consumer packages, at \$7.50 per carton (24/9-ounce), have been unchanged since October.

The carryover of frozen green beans into the 1982/83 pack year will probably be 10 to 20 percent less than last year. As a result, processors intended to contract for a tenth more area this year. Yields probably will not match 1981's record high of 3.28 tons per acre. However, the quantity packed per ton of raw product was extremely low last year. A return to more normal yields and packs would result in 1982/83 supplies close to 1981/82. In that case, price increases in the next year will be similar to rises in marketing costs.

Table 11.--Processed vegetables: Retail price, marketing margin, and farm value per unit, sold in Baltimore, indicated months, 1981 and 1982

	Marketing margin		Farm value 2/3/		
	Retail price 1/	Absolute	Percentage of retail	Absolute	Percentage of retail
		Cents	Percent	Cents	Percent
Beans (frozen) 9 oz.					
Jan. 1982	: 56.0	50.6	90	5.4	10
Oct. 1981	: 52.0	46.6	90	5.4	10
Jan. 1981	: 73.5	68.3	93	5.2	7
Corn (canned) 303					
Jan. 1982	: 50.0	42.0	84	8.0	16
Oct. 1981	: 44.8	37.2	83	7.6	17
Jan. 1981	: 45.0	38.6	86	6.4	14
Corn (frozen) 10 oz.					
Jan. 1982	: 51.0	43.4	85	7.6	15
Oct. 1981	: 52.0	44.6	86	7.4	14
Jan. 1981	: 45.0	38.1	85	6.9	15
Peas (canned) 303					
Jan. 1982	: 50.0	41.9	84	8.1	16
Oct. 1981	: 42.0	33.9	81	8.1	19
Jan. 1981	: 48.0	40.3	84	7.7	16
Peas (frozen) 10 oz.					
Jan. 1982	: 54.0	47.4	88	6.6	12
Oct. 1981	: 54.0	47.4	88	6.6	12
Jan. 1981	: 48.0	41.7	87	6.3	13
Tomatoes (canned) 303					
Jan. 1982	: 65.0	60.3	93	4.7	7
Oct. 1981	: 59.0	54.4	92	4.6	8
Jan. 1981	: 55.0	50.6	92	4.4	8

1/ Retail prices from Maryland Department of Agriculture.

2/ For quantity of product equivalent to retail unit sold to consumer. Because of waste and spoilage during processing and marketing, equivalent quantity exceeds retail unit.

3/ Production areas: Beans (frozen) Western; Corn (canned) Midwest; Corn (frozen) Western; Peas (sweet, canned) Midwest; Peas (frozen) West; Tomatoes (canned) California.

## Lima Beans

Canners held 1.5 million cases (basis 24/303's) of lima beans on March 1, moderately lower than last year. However, shipments have also lagged during the 1981-82 season. As a result, canners intend to contract for 18 percent less area during 1982. Although the carryover will be slightly above normal, such a reduction in acreage would cause a sharp decline in the pack, leaving 1982/83 supplies the lowest since 1974. This could result in some price runups later in the year. However, the slow movement has caused some price weakness, as wholesale prices of both retail and institutional cases (Midwest, medium) in early April were slightly below a year ago.

Stocks of frozen lima beans, at 31.1 million pounds, were sharply below a year ago on April 1. Both Fordhook and baby lima beans were in short supply. In early April, consumer packs (24/10-ounce) of baby lima beans were \$1.00 to \$1.50 more a carton than last year, while Fordhook cartons were 50 to 75 cents more. Food-service cartons were similarly higher. In response to the tight stocks, freezers intend to contract for 7 percent more area of baby limas than in 1981 and 36 percent more Fordhook area.

## Beets

Stocks of canned beets on January 1 equaled 9.4 million cases (basis 24/303's), 17 percent less than last year. Supplies of beets for 1981/82 were down substantially and contributed to the stocks decline. However, shipments of beets by canners were sluggish during second-half 1981. Despite the lower supplies, canners' prices have not differed much from a year ago.

Because of the lower supplies, canners intended to contract for 13 percent more acreage this year. Wisconsin and New York, which accounted for 75 percent of 1981 raw tonnage, expect to increase contract acreage about a fifth and a tenth, respectively.

## Carrots

Raw tonnage output of carrots for processing increased nearly a tenth in 1981 over 1980, resulting in about an 8-percent rise in the canned pack and nearly a 41-percent gain in the frozen pack—the largest on record. Although canned carrot stocks on January 1 were 8 percent below a year ago, shipments lagged during second-half 1981 from the year-earlier period by over a fourth.

Wholesale prices of most sizes and cuts of canned carrots were about even or less than a year ago. Meanwhile, stocks of frozen carrots on April 1 were up more than a sixth from last year. Despite the huge supply of frozen carrots this year, movement has been good, keeping wholesale prices firm. Prices advanced 30 cents to \$6.60 in early April for retail-size cartons (24/10-ounce), compared with \$6.00 last April. Foodservice cartons (12/2-pound) also moved up this spring, to 37-1/2 cents a pound, compared with 32-1/2 cents a year ago. Prices had been steady since last fall.

### **Broccoli**

The spring broccoli pack in California is underway. Area for harvest during the first half of the year (for fresh market and processing) was estimated at 41,400 acres, about a tenth more than last year. Based on average 1979-81 yields, projected production for the first half of the year will increase about 6 percent. In early April, the spring crop was making good progress, except in the Salinas Valley, where rains hampered growth and harvesting. The pack during January-March ran ahead of last year.

Frozen stocks of broccoli on April 1 totaled 65.6 million pounds, down a tenth from a year ago. During early April, retail packages (24/10-ounce) of spears, cuts, and chopped broccoli were wholesaling at \$1.00 to \$1.25 more than a year ago, while foodservice packs sold for 2 to 3 cents a pound more. Prices should remain firm this spring, as the spring crop may not be large enough to offset the reduced holdings.

### **Spinach**

Canners held 3.1 million cases (basis 24/303's) of spinach on January 1, 12 percent more than last year. Retail cases had been selling below last year's prices, but canners boosted prices because early spring rains in California could reduce the pack. Cases of 24/303's were quoted at \$8.40, about 30 cents more than in April 1981. Institutional cases (6/10's) moved up to \$9.85, compared with \$9.00 a year earlier.

Freezers reported smaller stocks of spinach on April 1—7 percent less than last year. Wet weather in California interrupted harvesting schedules, causing freezers to increase prices. Retail cases (24/10-ounce) were priced at \$5.60 in April for chopped and leaf, about 75 cents more than a year ago and last December. However, foodservice packs (12/3-pound) increased only a cent or two per pound.

### **Asparagus**

Shipments of canned asparagus increased 3 percent during 1981-82 to 2.9 million cases (basis 24/303's). With 1981-82 supplies about equal to the previous year's, the 1982-83 carryover on March 1 was down nearly 40 percent. During March, California canners of Fancy green asparagus were receiving \$3 to \$5 per carton more than last year for both retail and institutional packs.

Stocks of frozen asparagus on April 1 totaled 3.3 million pounds, two-thirds of last year's holdings. Prices of retail-size cases (24/10-ounce) of spears in early April, at \$38.75, were about \$8 more than a year ago. Institutional packs (24/2-1/2 pound) were quoted at \$2.35 a pound, compared with \$1.88 last year.

The 1982 area available for fresh market and processing in California was estimated at 29,600 acres, 8 per-

cent more than 1981. However, the crop progressed slowly because of cold weather. Rains in March caused wet fields, and production has been severely curtailed. Asparagus prices will likely average higher in the coming year.

### **Cucumbers for Pickles**

The 1982 contracted area of cucumbers for pickles was estimated to be 86,470 acres, 2 percent less than last year. Tonnage will probably decrease proportionately more because 1981's record yields are unlikely to be matched. This would be the third consecutive year of lower production. Pickle prices will probably be relatively high in the coming year.

### **Sauerkraut**

Canners intend to contract for 9 percent less cabbage tonnage this year. While stocks of kraut on April 1 were up 30 percent over last year, movement during 1981/82 has declined about 4 percent. In general, wholesale prices have been about even to slightly below a year ago.

## **POTATOES**

### **April Stocks Above Last Year**

Stocks of potatoes in the 15 major producing States totaled 77.5 million cwt on April 1, a 7-percent rise from last year, but a sixth lower than 2 years ago. The stocks increase was due to a year-to-year increase of about a tenth in the 1981 fall crop. Along with that larger crop, disappearance also increased strongly through April to 204 million cwt, 11 and 6 percent larger than movement for the comparable periods of 1981 and 1980, respectively. Total disappearance to date includes 23.5 million cwt that has been lost to shrinkage, fed to livestock on potato farms, dumped during grading, or discarded without grading. Processors have used a sixth more potatoes this season.

The April 1 pattern of stocks shows some regional differences. The Western States held 54.1 million cwt, 1-1/2 percent lower than a year ago. The stock decline in those States reflects the robust demand for potatoes by processors. Meanwhile, both the Eastern States and Central States had larger holdings than last year. Stocks in the Central States, at 13.0 million cwt, were up nearly two-thirds, while the Eastern States had 10.4 million cwt, an 8-percent rise.

### **Larger Holdings of Frozen Potatoes**

Stocks of frozen potatoes—both french fries and other frozen products—moved above year-earlier levels on March 1 for the first time since late 1980. Holdings totaled 839.4 million pounds, 8 percent more than a year ago. The larger 1981 fall crop reduced prices and encouraged a substantial rise in processing activity during 1981/82.

Cumulative exports of frozen french fries during October-February totaled 37.6 million pounds, a 9-percent increase from a year earlier. Exports to Japan, which account for more than three-fourths of the total, were up 11 percent.

The spring is an important decisionmaking period for the processed potato industry. Frozen potato processors

**Table 12-Potatoes, winter and spring: Acreage, yield per acre, and production, 1980, 1981 and 1982**

Seasonal group and State	Acreage			Yield per acre			Production		
	Harvested		for harvest 1982 <sup>1</sup>	1980	1981	1982 <sup>1</sup>	1980	1981	1982 <sup>1</sup>
	1980	1981							
1,000 acres									
Winter, total	11.5	11.6	11.3	205	189	205	2,363	2,198	2,319
Spring:						cwt.			1,000 cwt.
North Carolina:	13.0	13.3	13.8	140	155	155	1,820	2,062	2,139
Florida-Hastings	18.0	20.5	21.5	195	245	255	3,510	5,023	5,483
Other	.8	1.0	1.2	170	240	220	136	240	264
Alabama	5.0	4.0	3.4	125	180	140	625	720	476
Louisiana	1.7	1.6	1.1	70	80	80	119	128	88
Texas	6.2	6.0	6.0	130	140	190	806	840	1,140
Arizona	4.4	5.2	4.7	290	280	265	1,276	1,456	1,246
California	22.5	26.4	25.5	390	390	390	8,775	10,296	9,945
Total	71.6	78.0	77.2	238	266	269	17,067	20,765	20,781

<sup>1</sup>Indicated.

Source: Crop Production, SRS, USDA.

**Table 13-Pack of frozen potato products**

Year	Million pounds	Year	Million pounds
1960	551	1972	2,594
1961	579	1973	2,691
1962	762	1974	2,985
1963	862	1975	3,001
1964	1,118	1976	3,335
1965	1,219	1977	3,623
1966	1,460	1978	3,849
1967	1,491	1979	4,090
1968	1,736	1980	3,853
1969	2,048	1981	4,236
1970	2,404		
1971	2,565		

Source: American Frozen Food Institute.

generally build inventories and begin to contract for next fall's supplies. The larger supplies of frozen potatoes are currently putting downward pressure on institutional-pack prices. Idaho foodservice packs of Fancy long french fries were quoted at 31 cents a pound in April, slightly less than last year, while Fancy Maine french fries were 28-1/2 cents a pound, about even with a year ago. Retail packages (12/2-pound, Grade A) were \$10.79 a case at Western freezers, up from \$9.53 a year ago but unchanged since September. Eastern freezers were receiving \$9.80 a case, up from last year but unchanged from last fall. At retail, consumers paid an average of 67 cents a pound during March, up 6 cents from last year.

#### Spring Potato Production Unchanged

The production of spring potatoes was estimated to be 20.8 million cwt, fractionally above last year's crop. Slightly lower harvested acreage was offset by a 300-pound rise in yield per acre. Lower production was estimated for California (the leading spring crop State), Arizona, Alabama, and Louisiana. Meanwhile, Florida, Texas, and North Carolina were estimated to increase output.

In early April, excellent growth and crop conditions were reported in California. However, heavy rains

**Table 14-U.S. spring potato supplies**

	1980	1981	1982
1,000 cwts.			
April 1 stocks	92.6	72.5	77.5
Spring production	17.1	20.8	20.8
Total	109.7	93.3	98.3

slowed crop development and delayed the harvest in Kern County, California. Meanwhile, in Florida's Hastings area (the main potato region in Florida), nearly ideal conditions resulted in an early harvest start and prospective record yields.

Winter potato production was estimated at 2.32 million cwt, 6 percent more than last year's record low but 2 percent less than 1980. Although less area was planted and harvested, markedly improved yields caused the output gain. Both Florida and California had higher production this year.

#### Potato Prices Down from Last Year

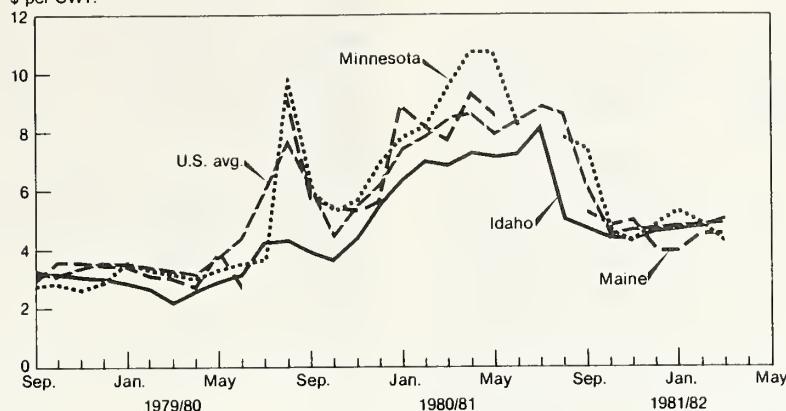
Because of larger potato supplies, both grower and retail prices of fresh potatoes have been below year-earlier levels since last fall. During the first quarter, growers received an average of \$4.76 a cwt, compared with \$7.67 last year. Meanwhile, the Consumer Price Index for fresh potatoes averaged 295.0 (1967=100), about 15 percent less than last year.

Open market quotations for processing potatoes ranged from \$5.00 to \$5.50 a cwt in Idaho in early April, down \$3 from last year, when supplies were extremely tight. During April, potato prices advanced modestly, reflecting reduced supplies of good table stock, in addition to the delay of the Kern County harvest.

Potato prices will increase seasonally this spring as fall crop supplies diminish. However, prices should average well below last year's record highs through the summer. During the second quarter, growers will receive about a third less than a year ago on average, while retail prices of fresh potatoes should decline about a fifth from last year. Prices this summer will largely be determined by summer and fall crop prospects.

**Potatoes: Grower Prices, U.S. and Selected States\***

\$ per CWT.



\*Crop year.

USDA

NEG. ERS 289-82(4)

**Table 15-Potatoes: Prices f.o.b. shipping points at terminal markets, and to growers, indicated periods, 1981 and 1982**

Item	Week ended						
	1981			1982			
	Feb. 7	Mar. 7	Apr. 11	Jan. 9	Feb. 6	Mar. 6	Apr. 10
<i>Dollars</i>							
F.o.b. shipping points:							
New stock							
Florida, Dade County							
U.S. No. 1, Size A. Round							
Reds <sup>1</sup>	---	22.80	20.00	---	-	16.00	13.00
Old stock							
Colorado San Luis Valley							
Red McClures <sup>2</sup>	13.00	14.50	16.00	8.00	8.00	8.00	8.00
Idaho, Idaho Falls							
Russets <sup>3</sup>	20.35	18.50	17.95	14.37	13.38	13.90	14.50
Maine, Aroostook County							
U.S. No. 1 Size A. Mostly							
Katahdin <sup>1,4</sup>	10.12	9.56	10.96	4.50	5.08	4.88	4.62
New York, Upstate							
Round White <sup>1</sup>	12.22	12.14	---	6.68	7.18	7.06	-
Michigan							
Round Whites <sup>1</sup>	13.14	13.40	---	6.24	7.08	---	-
Tuesday nearest mid-month							
	1981			1982			
	Feb. 17	Mar. 17	Apr. 14	Jan. 12	Feb. 16	Mar. 16	April 13
<i>Dollars</i>							
Terminal markets:							
New York:							
New stock							
Florida, Round Reds <sup>1,5</sup>	---	33.00	26.00	---	23.00	22.00	20.00
Old stock							
Long Island, various Round							
Whites <sup>1,5</sup>	13.30	---	-	8.30	9.00	---	-
Maine, Katahdin <sup>1,4,5</sup>	13.50	14.00	14.30	8.00	8.70	9.30	8.50
Idaho, Russets <sup>1,5</sup>	28.00	27.00	26.00	22.00	22.70	22.50	22.50
Chicago:							
New stock							
Florida, Round Reds <sup>1,5,6</sup>	27.50	---	16.00	---	24.00	19.00	9.00
Old stock							
Idaho, Russets <sup>5,6</sup>	29.00	26.50	25.50	20.50	21.00	21.00	21.00
Minnesota-North Dakota,							
Round Reds <sup>5,6</sup>	17.00	17.25	18.75	9.50	19.00	9.25	9.00
Month							
	1981			1982			
	Feb.	Mar.	Apr.	Jan.	Feb.	Mar.	
<i>Dollars</i>							
U.S. price received by growers	7.88	8.33	8.53	4.63	4.78	4.86	
U.S. average parity price	8.25	8.31	8.38	8.88	8.90	8.96	

<sup>1</sup>50-pound price doubled. <sup>2</sup>2-inch up, washed. <sup>3</sup>4-oz. minimum. <sup>4</sup>2-inch minimum. <sup>5</sup>U.S. No. 1, Size A. <sup>6</sup>Street sales. F.o.b. prices are the simple averages of the mid-point of the range of daily prices. Terminal market prices are for Tuesday of each week as reported by Market News representatives of the Fruit and Vegetable Division of AMS. N.A. = Not Available.

## SWEETPOTATOES

Marketing of last season's sweetpotato crop—15 percent above the 1980 harvest—is winding down seasonally. Through mid-April, fresh market use of the larger crop was about a fifth smaller than for the comparable period last year.

The smaller fresh market use has been more than offset by larger processor utilization. Canners' carryover stocks were reduced to historical lows last summer, requiring a larger pack. Between July and December 1981, canners packed 7.9 million cases (basis 24/303's), 43 percent above the previous year but 13 percent less than 2 years ago. Because of the larger pack, canned stocks were up nearly a third on January 1. Shipments were off moderately during the last half of 1981. However, wholesale prices in April were above a year ago. Sirup-packed cases of 24/303's (whole sweetpotatoes) were priced at \$11.50 to \$12.50, compared with \$11.00 a year ago.

Canners' carryover stocks this summer should be substantially above last year, but still well below normal levels. However, production of sweetpotatoes should be ample for canners to service the normal annual trade volume of 8 to 9 million cases during 1982/83.

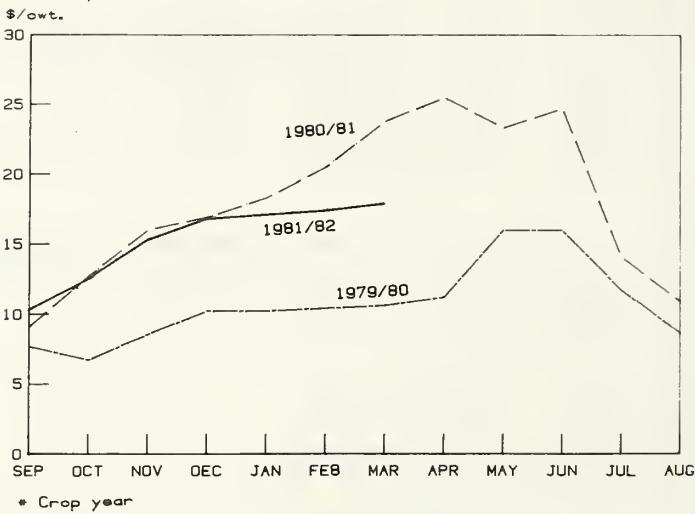
On February 25, the USDA announced the purchase of 5,600 24/303 cases of canned sweetpotatoes for distribution through domestic feeding programs April 1-June 30. This brings current fiscal year purchases to 16,800 cases of 24/303's.

Sweetpotato planting intentions published in mid-February indicate 115,000 acres will be used this year, a 2-percent increase over 1981. North Carolina farmers intend to plant 42,000 acres, 5 percent more than in

1981. Louisiana acreage will be down moderately to 26,000 acres. On the whole, 8 of the 12 major producing States expect acreage increases. Based on average crop abandonment and yields, production of sweetpotatoes would approximate last year's total of 12.6 million cwt.

Grower prices given a larger carryover, could start declining later this year. The average grower price for first-quarter 1982 was \$17.10 per cwt, compared with \$18.37 last year and \$10.30 2 years ago. Strong demand by canners has supported prices. Prices through the summer months will increase, reflecting seasonal trends, but they will stay moderately below 1981 prices.

**Sweetpotatoes: U.S. Grower Prices\***



USDA

Neg. ERS 3074-82 (4)

**Table 16-Sweetpotatoes: F.o.b. prices at Louisiana and California points and terminal market prices at New York and Chicago for stocks of generally good quality and condition (U.S. No. 1 when available), indicated periods, 1981 and 1982**

Location and variety	Unit	Week ended						
		1981	1982					
		Feb. 7	Mar. 7	Apr. 11	Jan. 9	Feb. 6	Mar. 6	Apr. 10
<i>Dollars</i>								
F.o.b. shipping points								
S.W. Louisiana points								
Porto Rico type U.S.	50 pound							
No. 1, cured	crate	13.00	13.75	16.00	12.00	12.00	12.00	12.00
California,	40 pound							
Garnet	carton	10.40	10.80	11.60	10.40	11.00	13.60	15.80
Tuesday nearest mid-month								
		1981				1982		
		Feb. 17	Mar. 17	Apr. 14	Jan. 12	Feb. 16	Mar. 16	Apr. 13
<i>Dollars</i>								
Terminal markets								
New York:								
New Jersey, Orange	Bushel							
Jersey type	carton	---	---	---	---	---	---	---
North Carolina,								
Jewels	carton	14.50	16.75	17.50	11.75	12.25	12.50	12.50
Chicago:								
North Carolina,								
cured	carton	14.75	17.00	18.25	13.00	13.00	13.00	13.50

F.o.b. prices are simple averages of the mid-point of the range of daily prices. Market prices are for Tuesday of each week as reported by Market News representatives of the Fruit and Vegetable Division of AMS.

**Table 17-Sweetpotatoes: Plantings, 1980, 1981 and indicated 1982**

Area	Acreage			
	1980	1981	Indicated 1982 <sup>1</sup>	1982 as percentage of 1981
	<i>1,000 acres</i>		<i>Percent</i>	
Central Atlantic <sup>2</sup>	5.9	6.2	6.6	106
Lower Atlantic <sup>3</sup>	46.3	49.5	52.5	106
Central <sup>4</sup>	47.2	48.1	46.4	96
California	8.4	8.9	9.0	101
United States	107.8	112.7	114.5	102

<sup>1</sup>Indicated as of February 1. <sup>2</sup>New Jersey, Maryland and Virginia. <sup>3</sup>North Carolina, South Carolina, and Georgia. <sup>4</sup>Tennessee, Alabama, Mississippi, Arkansas, Louisiana, and Texas.

Source: Prospective Plantings, SRS, USDA.

## MUSHROOMS

The mushroom market was fairly quiet during the first quarter of 1982, as the supply of mushrooms is ample. The supply tends to be almost excessive, as processors continue to seek access to fresh sales. The price range for fresh market mushrooms has changed very little over the past 3 months. At Kennett Square, Pennsylvania, 1982 grower prices averaged from 62 cents to 68 cents a pound, the general price fluctuating around 62 cents to 64 cents. Prices have declined about 5 cents from the previous year. However, retail prices of fresh mushrooms in the first quarter averaged \$1.87 a pound, up 9 percent from 1981.

The BLS wholesale price index for canned mushrooms shows a 9-percent increase since the imposition of the tariff, an average of 196.9 in 1981 compared with 180.0 in 1980 (December 1967=100). However, it is uncertain whether or not this price increase is due solely to the tariff. It is true that some canned mushroom imports—such as shelf-size containers—were substantially less last year, but others were comparable to a year ago. During July 1–February 1, imports for all 24/4-ounce containers dropped 32 percent from a year earlier, while the 6/10 size declined only 5 percent. Mainland China's competitive edge is still keen and much felt in U.S. markets. The increased tariff has yet to significantly affect Chinese mushroom exports to the United States, possibly because China has preferred-nation status.

**Table 19-Canned Mushroom Imports**

Country	1980/81	1981/82*
	<i>Million pounds</i>	
Taiwan	35.3	13.9
South Korea	11.2	3.9
Others	45.3	34.5
Total imports	91.8	52.3

\* July through January of following year.

Source: Bureau of Census.

## ITC Rules on Imports

Investigation continues into the import situation. On March 10, hearings were held in Washington, D.C., by the International Trade Commission (ITC), to discuss Chinese (PRC) imports and the relaxation of regulations for mushrooms broiled in butter. The commission met on April 7 to vote on these topics. The vote was unanimous that the "no exclusion" ruling be kept. The April 15 report to the President found that "the exclusion of canned and frozen mushrooms broiled in butter or in butter sauce from import relief presently in effect would have an adverse economic effect on the domestic mushroom industry." The normal duty plus 15 percent ad valorem will continue through October 31. At that time, the tariff will be reduced to normal duty plus 10 percent ad valorem and will be effective until October 31, 1983.

The tariff rate hikes, however, were not meant to provide a long-run solution to the problems of the mushroom industry. The temporary increases were designed to give the industry a chance to adjust to foreign competition.

## USDA Studies Mushroom Situation

The Agricultural Marketing Service (AMS) of USDA recently completed a study on options that the industry in the Middle Atlantic States has for coping with larger imports. Conclusions from the study suggest that domestic canners can't compete with imports, and that their future probably rests in an expansion of the fresh market. The current situation, characterized as one of disorderly marketing, results from producers' efforts to obtain a share of the more profitable fresh market as processing market opportunities decline. The expansion of fresh market demand will not alleviate the situation unless all producers are allowed access to the new market, nor will it enhance short-run prices. Buyers face an almost perfectly elastic supply curve, that is, they can obtain additional fresh supplies without significantly

**Table 18-Average prices received by farmers for sweetpotatoes, dry edible beans, and dry edible peas, United States, indicated periods, 1981 and 1982**

Commodity	1981			1982	
	February	March	January	February	March
				Dollars	
Sweetpotatoes	18.30	19.90	16.80	17.10	17.40
Beans, dry edible	28.30	30.00	20.60	19.80	18.50
Peas, dry field	9.86	10.30	10.40	11.50	12.00

Source: Agricultural Prices, SRS, USDA.

increasing prices. This situation will continue as long as the pool of unsatisfied growers of processing mushrooms exists and can sell in fresh markets. After analyzing the problem of equity and market access, two options were offered by AMS: (1) that producers consider the promotional features of federal marketing orders and (2) that producers explore development of bargaining associations. Although little headway has yet been made on the marketing order proposal, there currently is a bill in Congress to amend the Marketing Agreement Act so as to allow for paid advertising.

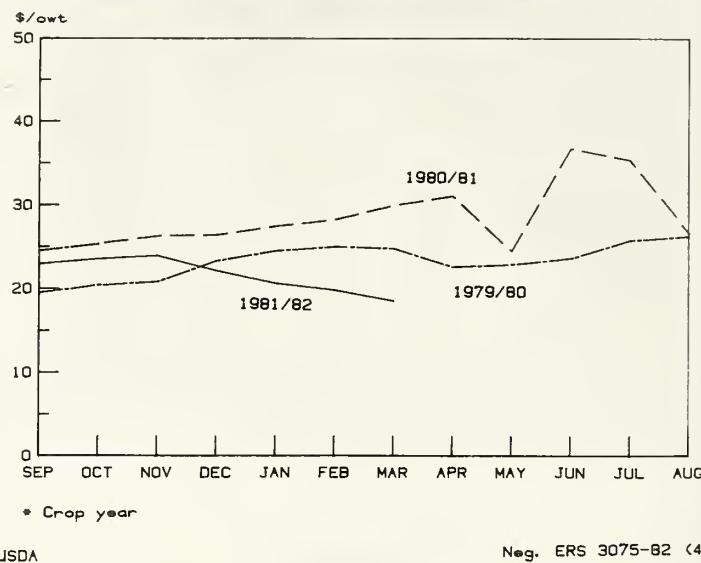
## DRY EDIBLE BEANS

### Current Situation

Dry bean production totaled a record 31.8 million cwt in 1981, up a fifth from the 1980 high. The dry bean market currently is sluggish because of a slow sales pace and large supplies. For the bean market as a whole, there is little interest in beans at any price; buyers aren't buying and growers aren't selling. This is especially true for pinto beans, where the situation is further depressed by the absence of new Mexican contracts. Great Northerns provide one of the few bright spots in the industry. They found a customer in Yugoslavia, which purchased 5,200 tons for delivery around late April. Algeria also is interested in Nebraska Great Northerns, with the result that prices have edged upwards. Colombia took small reds of #2 quality. Season totals for all exports from September to February show nearly 11.8 million cwt shipped, up 13 percent over 1980/81. On the domestic side, consumption remains steady. Seed beans are quiet. Some growers are booking seeds, but at quantities much lower than previous years.

As a result of the sluggish markets, bean prices through the first quarter of 1982 were down substantially from a year earlier. F.o.b. dealer prices for pintos, at about \$15 per cwt, are almost half of what they were in 1981. Grower prices for pintos are below farmers' production costs. Small reds and pinks are doing little better, and sales are drooping. Great Northern prices, despite export sales, are down sharply from 1981. Only Michigan pea bean prices are at levels roughly comparable to 1981, and they, too, have dropped substantially. Average grower prices for all classes of beans during first-quarter 1982, at \$19.63 a cwt, were 31 percent lower

### Dry Beans: U.S. Grower Prices\*



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than a year earlier. These were the lowest quarterly average prices since the second quarter of 1979.

### Outlook for 1982

Lower bean prices already have affected planting intentions. Growers presently are reluctant completely to tip their hand for the coming season, but it is evident that acreage will drop this year. As of early February, growers indicated their intention to plant 2.2 million acres in 1982, off 5 percent from last season. The current slump in bean markets will probably reduce actual plantings even more. All major bean States, with the exception of California, Minnesota, and North Dakota, report acreage cutbacks. At present, Colorado and Idaho plan to reduce bean acreage by 18 and 19 percent, respectively, while Nebraska and Michigan say they will plant 13 and 8 percent less, respectively.

If producers reduce acreage by only 5 percent, production would still likely be the second or third largest on record. Hence, unless export demand picks up in the coming months, prices will continue sharply lower than in 1981.

Table 20-Beans, dry edible: Acreage planted, 1980 and 1981, and prospective acreage, 1982<sup>1</sup>

Group of States	Acreage planted			
	1980	1981	indicated 1982 <sup>2</sup>	1982 as percentage of 1981
1,000 acres				Percent
New York	51.0	51.0	50.0	98
Michigan	590.0	650.0	600.0	92
Nebraska, Montana, Idaho, Wyoming, and Washington	446.0	603.0	511.0	85
Minnesota and North Dakota	355.0	540.0	590.0	109
Kansas, Colorado, and Utah	227.0	245.0	201.0	82
California	213.0	231.0	250.0	108
United States	1,882.0	2,320.0	2,202.0	95

<sup>1</sup>Excludes beans grown for garden seed. <sup>2</sup>Indications as of February 1.

Source: Prospective Plantings, SRS, USDA.

**Table 21-Peas, dry edible: Acreage planted, 1981, and Prospective Acreage, 1982<sup>1</sup>**

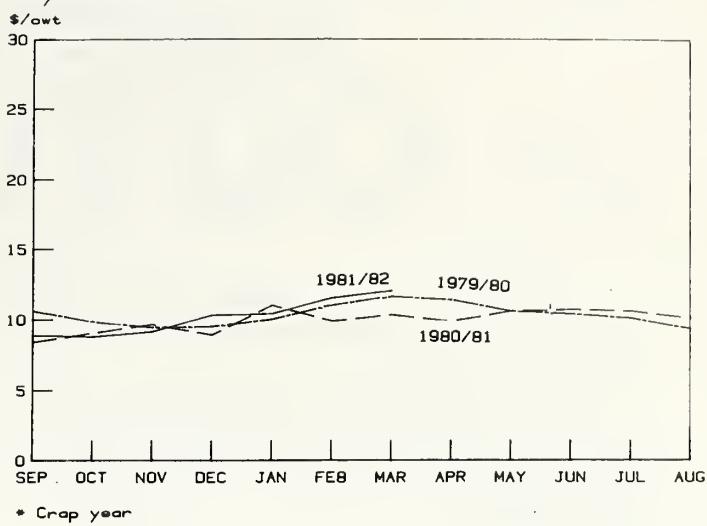
State	Acreage planted		
	1981	1982 <sup>2</sup>	1982 as percentage of 1981
<i>1,000 acres</i>			
Idaho	45.0	60.0	133
Washington	67.0	84.0	125
U.S.	112.0	144.0	128.6

<sup>1</sup>Excludes both Wrinkled Seed Peas and Austrian Winter Peas.

<sup>2</sup>Indications as of February 1.

Source: Prospective Plantings, SRS, USDA.

Dry Peas: U. S. Grower Prices\*



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